





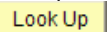



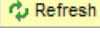

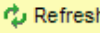



## CREATE A PURCHASE ORDER




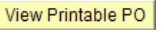
### Exercise 1: Create a PO with One Line, One Schedule, and One Distribution.

Steps	Directions	Comments
<b>BEFORE STARTING THE EXERCISE, PLEASE MAKE SURE THAT YOU ARE IN THE TRAINING ENVIRONMENT:</b> <a href="https://www.connectnd.us/psp/ndrt/?cmd=login">https://www.connectnd.us/psp/ndrt/?cmd=login</a> . Use your regular User ID and password.		
<b>Then, follow the checklist for customizing your purchasing screens at</b> <a href="http://www.nd.gov/spo/connectnd/docs/customization-po.pdf">http://www.nd.gov/spo/connectnd/docs/customization-po.pdf</a> . This step will need to be done in the training environment before proceeding.		
1.	<b>Navigation:</b> <i>Purchasing</i> → <i>Purchase Orders</i> → <i>Add/Update POs</i>	
2.	On the “Add a New Value” Page Verify <b>Business Unit (BU)</b> Keep <b>Purchase Order</b> as <b>(NEXT)</b> Click 	Click  to search BU (if needed).  The Purchase Order number should default in as NEXT. <b>DO NOT</b> change or overwrite this information.
3.	<b>Maintain Purchase Order Page</b> Enter the vendor number in the Vendor ID field, or Click on <a href="#">Vendor Search</a> and search for a vendor by Name 1 or Short Name. Click ‘Search’. Check the box that corresponds to the vendor you want. Click ‘OK’.	
4.	Click on <a href="#">Vendor Details</a> to verify the correct address. Use the look-up feature on the Location to find the correct address for your PO. Click OK.	<i>It is necessary to check the address of the vendor because it may default to “Choose the Correct Address/Location” on your PO.</i>
5.	Enter yourself as a buyer by using the look-up feature  to find the value.	<i>Some of the defaults may fill in based upon the Buyer Setup.</i>
6.	Enter a PO Reference to describe the purchase or the project it is being purchased for. For this exercise, you may just want to enter “Create a PO”	<i>The PO reference field can be used to track purchases for a particular product, service, or program.</i>
7.	Click the <a href="#">Header Details</a> hyperlink. <u>PO Details:</u> <ul style="list-style-type: none"> <li>• Verify <b>PO Type</b> (leave as GEN)</li> <li>• Verify the <b>Billing Location</b></li> <li>• Select correct <b>Origin</b> if it didn’t fill in upon selecting the buyer. Use the look up icon  to find the values for your agency.</li> <li>• Verify that the <b>Tax Exempt ID</b> is correct and selected.</li> </ul> <u>Currency:</u> The Currency information should be reviewed and left unchanged.	

Steps	Directions	Comments
	<p><u>Process Control Option:</u></p> <ul style="list-style-type: none"> <li>The <b>Acknowledgements required for</b> box should show "Not required."</li> <li>Verify that the <b>Dispatch</b> box is checked and the <b>Method</b> = Print.</li> <li><b>Accounting Date:</b> Current Date – do not change.</li> <li><b>Accounting Template:</b> STANDARD or leave blank.</li> </ul> <p>Click  to return to the Maintain Purchase Order page.</p>	
8.	<p>Click the <a href="#">PO Defaults</a> hyperlink.</p> <ul style="list-style-type: none"> <li>Verify that the "Override" button is selected under Default Options.</li> <li>Fill in any fields on this page that will pertain to each line of your purchase order, such as: <ul style="list-style-type: none"> <li>Category or unit of measure</li> <li>The Ship To location</li> <li>A SpeedChart</li> <li>Or any other accounting information each line has in common.</li> </ul> </li> <li>Enter today's date as the Due Date.</li> <li>Click 'OK.'</li> </ul>	
9.	<p>Click the <a href="#">Add Comments</a> hyperlink.</p> <p>You may enter anything on this screen to address comments on the PO header. You have options depending upon which box you check:</p> <ul style="list-style-type: none"> <li>Send to Vendor – the comments will appear on the dispatched PO.</li> <li>Shown at Receipt – the comments may be addressed to whoever does the receiving for your agency.</li> <li>Shown at Voucher – the comments here will appear in the PO voucher under the <a href="#">View Source PO/Receiver Information</a> hyperlink and <a href="#">PO/Receipt Comments</a>.</li> <li>Click 'OK.'</li> </ul>	<p><i>Note that the hyperlink name changed to "<a href="#">Edit Comments</a>."</i></p>
10.	<p>Move to the section called <b>Lines</b>.</p> <ul style="list-style-type: none"> <li>You may ignore the field called 'Item.'</li> <li><b>Description</b> - Type a description of the item you are purchasing. Fields are limited to 250 characters.</li> <li><b>PO Qty</b> – Type the quantity you wish to purchase.</li> <li><b>UOM</b> (Unit of Measure) – This will default from the defaults page once the Refresh button is clicked. If it is different than the default value or if you didn't enter a UOM in the defaults, select a value here.</li> <li><b>Category</b> – This will default from the defaults page once the Refresh button is clicked. If it is different than the default value or if you didn't enter a Category in the defaults, select a value here by using the magnifying glass . Enter a short description of the item, such as "towel" and click . Select the category you need from the</li> </ul>	<p><i>If your description is larger than 250 characters, click the Line Comments icon . This is also limited to 250 characters, but you can add as many line comments you need by clicking on the + sign by the yellow Inactivate button.</i></p>

Steps	Directions	Comments
	<p>Search Results.</p> <ul style="list-style-type: none"> <li>Enter the unit <b>Price</b> of the item.</li> </ul> <p>Click .</p>	
11.	<p>If the category you selected is an inventory item, you will see that the <b>Receiving Required</b> field changed its value to "Receiving is Required." You must change this field back to say "<b>Receiving is Optional</b>."</p>	<i>New step for 9.0 version.</i>
12.	<p>Click the Schedule icon  on the far right of the Line.</p>	
13.	<p><b>Schedule Page</b> Verify that the Due Date, Ship To, PO Qty, Price, and Amount fields are filled in. You can make any changes to these fields as necessary. Click  again if you do.</p>	
14.	<p>Click the Distribution icon  found to the far right of the Schedule line.</p>	
15.	<p><b>Distributions for Schedule 1</b> Many of these fields may have filled in automatically from the <a href="#">PO Defaults</a> link. Verify the following required fields:</p> <ul style="list-style-type: none"> <li>GL Unit</li> <li>Account</li> <li>Oper Unit</li> <li>Fund</li> <li>Dept</li> <li>Class</li> <li>Location</li> </ul> <p>Additional fields if your agency uses projects:</p> <ul style="list-style-type: none"> <li>PC Bus Unit</li> <li>Project</li> <li>Activity</li> <li>Category</li> <li>Subcategory</li> </ul> <p>SpeedCharts may also be used here.</p> <p>Click OK.</p>	<p><b>Important Note:</b> If the account number <b>888887</b> appears here, it is because the category you chose on the Line is an inventory item. This account number automatically overrides any defaults you entered, even though it is an invalid number. You <u>must</u> change this field to the correct account number.</p>
16.	<p>You are on the Schedule Page; click the <a href="#">Return to Main Page</a> hyperlink to get back to the Maintain Purchase Order screen.</p>	
17.	<p>Click the <a href="#">Add Ship To Comments</a> hyperlink.</p>	
18.	<p><b>PO ShipTo Comments</b> On this page you can add any instructions for the shipping or delivering of the item.</p> <ol style="list-style-type: none"> <li>In the drop-down box next to "Ship To", select the location your comments pertain to.</li> </ol>	<i>In this exercise, there should only be one schedule and one Ship To location used.</i>





Steps	Directions	Comments
	<ol style="list-style-type: none"> <li>Enter your comments in the box provided. There is a maximum of 250 characters allowed.</li> <li>Like for the Header comments, select from the following boxes to have these comments show up: <ol style="list-style-type: none"> <li>Send to Vendor</li> <li>Shown at Receipt</li> <li>Shown at Voucher</li> </ol> </li> <li>Click OK.</li> </ol>	
19.	<p>You will be taken back to the <a href="#">Maintain Purchase Order</a> page.</p> <p>Make sure that the box beside '<b>Hold From Further Processing</b>' is <b>NOT</b> checked.</p> <p>Click .</p> <p>A PO number will be assigned by the system.</p>	Record this PO number here: _____
20.	<p><b>Budget Check PO</b></p> <p>Now your PO needs to be budget checked to see if the accounting information is accurate and to encumber these funds against your agency's budget.</p> <p>Click the icon  next to <b>Budget Status</b> in the upper right corner of your screen. If you see the word "Processing" in red flash at the top of the screen, that means the system is still busy budget checking. Do not do anything to the PO while that message appears.</p> <p>When the <b>Budget Status</b> says "Valid", your PO is budget checked and ready to be approved.</p>	<i>If you receive an error message or if the budget status remains 'Not Checked,' notify your agency's PO Administrator.</i>
21.	<p><b>Approve Amounts</b></p> <p><b>Navigation:</b> <i>Purchasing → Purchase Orders → Approve Amounts</i></p> <p>You may be taken to the correct screen automatically if you go to this navigation straight from the PO main page. If your PO does not show up on the <b>Purchase Order Amount Approval</b> screen, follow these steps:</p> <ul style="list-style-type: none"> <li>'Find an Existing Value' –</li> <li>Make sure your business unit and SetID fills in correctly.</li> <li>Enter your PO number you recorded in step 18.</li> </ul>	<i>You can only approve one PO at a time.</i>
22.	<p>Verify that the word "Approve" shows up in the <b>Approval Action</b> box.</p> <p>Click .</p> <p>The <b>Approval Status</b> should change from "Initial" to "Complete."</p>	<b>Note:</b> For training purposes, your security should be set up to approve all your own purchase orders and requisitions in one step. In the live PeopleSoft system, some buyers may have to do the initial approval only and put the PO into workflow or a final approver. That is covered in the <i>Final Approvers Checklist</i> .
23.	<p>If you want to see how the purchase order will look when it is printed, click on the yellow button .</p>	
24.	<p>You will be taken to the Process Monitor.</p> <p>Look for the Process Name "POPO005".</p>	


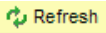

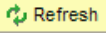


Steps	Directions	Comments
	Click the <b>Refresh</b> button every 30-60 seconds until the ' <b>Run Status</b> ' says "Success" and the ' <b>Distribution Status</b> ' says "Posted."	
25.	<p>Click on the <a href="#">Details</a> hyperlink.</p> <p>Then click <a href="#">View Log/Trace</a>.</p> <p>In the middle of the next screen under File List, Name look for a PDF file beginning with "POPO0005." Click on that link.</p> <p>This is how your purchase order will look when it is "dispatched," or printed. Note how everything you entered is now appearing:</p> <ul style="list-style-type: none"><li>• Buyer's name</li><li>• Ship To address</li><li>• Bill To address (may be different in some agencies)</li><li>• Your item description, quantity, price, and amount.</li><li>• Your Header Comment prints first, then your shipping comment.</li></ul> <p>If you scroll to the bottom of the pdf screen, you will notice that it says "<b>Unauthorized</b>." The approver's name will appear here after the dispatching process, but not until then.</p> <p>If something is incorrect, you can still go back and fix the PO at this point.</p> <p>Depending upon what you change on the PO, you may have to budget check it again before dispatching.</p>	<p><i>This preview of the PO is a new feature with PeopleSoft 9.0. It is meant to be a preview only and so the signature will always show as "Unapproved." This is a safety measure so that this view cannot be sent to the vendor without further approval and/or dispatching.</i></p>
26.	<p><b><u>Printing the Purchase Order</u></b></p> <p>Printing is called "dispatching" in PeopleSoft Purchasing.</p> <p><b>Please complete training exercises 1 and 2 on Dispatching to print your purchase order.</b></p>	<p><i>For a quick review on how to create a new PO, see the checklist at:</i></p> <p><a href="http://www.nd.gov/spo/connectnd/docs/create.pdf">http://www.nd.gov/spo/connectnd/docs/create.pdf</a>.</p>









**Exercise 2: Create a PO with Multiple Lines, Multiple Schedules, and One Distribution.**

Steps	Directions	Comments
1.	<b>Navigation:</b> <i>Purchasing → Purchase Orders → Add/Update POs</i>	
2.	On the “Add a New Value” Page Verify <b>Business Unit (BU)</b> Keep <b>Purchase Order</b> as <b>(NEXT)</b> Click  .	Click  to search BU (if needed).  The Purchase Order number should default in as NEXT. <u>DO NOT</u> change or overwrite this information.
3.	<b>Maintain Purchase Order Page</b> Enter vendor number 0000000172 in the Vendor ID field, or Click on the magnifying glass for that field.  If Brown & Saenger appears in the Search Results, click on the blue hyperlink on that page. You will be taken back to the main PO screen.	Use Brown & Saenger, vendor #0000000172 for this particular exercise.
4.	Click on <a href="#">Vendor Details</a> to verify the correct address. Notice that the address appears as “CHOOSE THE CORRECT LOCATION.” When you see this message, it means that the vendor has more than one address/location to choose from. Use the look-up feature on the Location to find the correct address for your PO. In this exercise, select “PO – BISMARCK.” Click OK.	<i>It is necessary to check the address of the vendor because it may default to “Choose the Correct Address/Location” on your PO.</i>
5.	Enter yourself as a buyer by using the look-up feature.	<i>Some of the defaults may fill in based upon the Buyer Setup.</i>
6.	For this exercise, enter a PO Reference of “ <b>Multiple Lines</b> ”.	
7.	Click the <a href="#">Header Details</a> hyperlink. <ul style="list-style-type: none"><li>• Verify the billing location and address.</li><li>• Verify that the correct Origin Code fills in.</li><li>• The other fields should default in correctly and should not need any changes.</li><li>• Click OK.</li></ul>	<i>The <b>origin code</b> must be accurate for the approval workflow to process correctly.</i>
8.	Click the <a href="#">PO Defaults</a> hyperlink. <ul style="list-style-type: none"><li>• Verify that the “Override” button is selected under Default Options.</li><li>• Fill in any fields on this page that will pertain to each line of your purchase order, such as:<ul style="list-style-type: none"><li>○ Category or unit of measure</li><li>○ The Ship To location</li><li>○ A SpeedChart</li><li>○ Or any other accounting information each line has in common.</li></ul></li><li>• Enter today’s date as the Due Date.</li><li>• Click ‘OK.’</li></ul>	<i>Fields most often filled in as defaults are:</i> <ol style="list-style-type: none"><li>1. Ship To location</li><li>2. Oper Unit</li><li>3. Fund</li><li>4. Dept</li><li>5. Class</li><li>6. Location (found way to the right of the screen)</li></ol> <i>Use accounting information for your agency.</i>
9.	Click the <a href="#">Add Comments</a> hyperlink. You may enter anything on this screen to address comments on the PO header. You have options depending upon which box you check: <ul style="list-style-type: none"><li>• Send to Vendor – the comments will appear on the dispatched PO.</li></ul>	

Steps	Directions	Comments
	<ul style="list-style-type: none"> <li>Shown at Receipt – maybe the comments are addressed to whoever does the receiving for your agency.</li> <li>Shown at Voucher – the comments here will appear in the PO voucher under the <a href="#">View Source PO/Receiver Information</a> hyperlink and <a href="#">PO/Receipt Comments</a>.</li> <li>Click 'OK.'</li> </ul>	<i>Note that the hyperlink name changed to <a href="#">"Edit Comments."</a></i>
10.	<p>Move to the section called <b>Lines</b>.</p> <ul style="list-style-type: none"> <li><b>Description</b> – Enter any description you like. Fields are limited to 250 characters.</li> <li>Enter <b>PO Qty</b> of 4.</li> <li><b>UOM</b> (Unit of Measure) – This will default from the defaults page once the Refresh button is clicked. If it is different than the default value or if you didn't enter a UOM in the defaults, select a value here.</li> <li><b>Category</b> – This will default from the defaults page once the Refresh button is clicked. If it is different than the default value or if you didn't enter a Category in the defaults, select a value here.</li> <li>Enter the unit <b>Price</b> of the item.</li> </ul>	<i>If your description is larger than 250 characters, click the Line Comments icon . This field is also limited to 250 characters, but you can add as many line comments you need by clicking on the + sign by the yellow Inactivate button.</i>
11.	<p>Add a second line item by clicking the + sign on the far right side of Line 1.</p> <p>A Script Prompt box will appear asking how many rows you wish to add. Enter "1" and click OK.</p> <p>Enter a new description.</p> <p>Enter <b>PO Qty</b> of 6.</p> <p>Enter UOM and category of your choosing.</p> <p>Click .</p>	<i>You now have a multiple-line PO!</i>
12.	<p>If the category you selected is an inventory item, you will see that the <b>Receiving Required</b> field changed its value to "Receiving is Required."</p> <p>You must change this field back to say "<b>Receiving is Optional</b>."</p> <p>Click the Schedule icon  on the far right of the Line.</p>	<i>New step for 9.0 version.</i>
13.	<p><b>Schedule Page</b></p> <p><b>For Line Item 1:</b></p> <p><u>Schedule 1:</u></p> <p>Verify Due Date, Ship To, Price, and Amount.</p> <p>For this exercise, change the <b>PO Qty</b> from 4 to 2.</p> <p>Click .</p>	<i>You may receive a warning message that the quantities do not match between the Schedule page and the Main page. Just Click "Yes" to keep the new value.</i>
14.	<p>Add a second schedule to Line 1 by clicking the + sign on the far right side of the schedule line, next to the distribution icon.</p> <p>A Script Prompt box will appear asking how many rows you wish to add. Enter "1" and click OK.</p>	
15.	<p><u>Schedule 2:</u></p> <ul style="list-style-type: none"> <li>Enter a different Ship To location for your agency (if available);</li> <li>Keep the same Due Date as in Schedule 1;</li> </ul>	


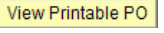



Steps	Directions	Comments
	<ul style="list-style-type: none"> <li>Verify that the PO Qty of 2 carried forward; and</li> <li>Verify the Unit Price (Should be the same as Schedule 1).</li> <li>Click  Refresh.</li> </ul>	
16.	<p>Click the distribution icon  on Schedule 1.</p> <p>Verify the accounting values, especially the account number to make sure it did not change. You may also use one or more SpeedCharts.</p> <p>Click OK.</p>	
17.	<p>Click the distribution icon  on Schedule 2.</p> <p>Verify the accounting values, especially the account number to make sure it did not change. Enter any project information as needed.</p> <p>Click OK.</p>	<p>If the account number <b>888887</b> appears on either of these lines, it is because the category you chose is an inventory item. You <u>must</u> change this field to the correct account number before saving.</p>
18.	On the Schedules Page, click 'View All' if that choice is available.	

<p><b>Lines</b></p> <p>Line: 1    Item: <a href="#">example</a>    PO Qty: 4.0000    EA    Amount: 400.00    USD</p> <p><b>Schedules</b></p> <p>Customize   Find   View All   First 1 of 2 Last</p>		
19.	<p>You should see two lines on the screen, the first one with two schedules.</p> <p><b>For Line Item 2:</b></p> <p>Verify Due Date, Ship To, Price, and Amount.</p> <p>Click the distribution icon  on Schedule 1 for Line 2.</p> <p>Verify the accounting values, especially the account number to make sure it did not change. Click OK.</p>	
20.	<p><b>Schedules Page</b></p> <p>Click .</p> <p>Click the <a href="#">Return to Main Page</a> hyperlink to get back to the Maintain Purchase Order screen.</p>	Record this PO number here: _____
21.	<p>Click the hyperlink <a href="#">Add Ship To Comments</a> just above the Save button.</p> <p>In the Ship To drop-down box, choose from one of the Ship To Locations listed.</p> <p>Type in, "<b>Just Checking</b>".</p> <p>Check all three boxes to send to vendor, show at receipt, and show at voucher.</p> <p>Click OK.</p>	
22.	Click <a href="#">Return to Main Page</a> link. Click SAVE again.	
23.	<p><b>Budget Check PO</b></p> <p>Now your PO needs to be budget checked to see if the accounting information is accurate and to encumber these funds against your agency's budget.</p> <p>Click the icon  next to <b>Budget Status</b> in the upper right corner of your screen. If you see the word "Processing" in red flash at the</p>	






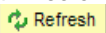




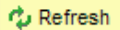


	<p>top of the screen, that means the system is still busy budget checking. Do not do anything to the PO while that message appears.</p> <p>When the <b>Budget Status</b> says “Valid”, your PO is budget checked and ready to be approved.</p>	<p><i>If you receive an error message or if the budget status remains 'Not Checked,' notify your agency's PO Administrator.</i></p>
24.	<p><b><u>Approve Amounts</u></b></p> <p><b>Navigation:</b> <i>Purchasing → Purchase Orders → Approve Amounts</i></p> <p>You may be taken to the correct screen automatically if you go to this navigation straight from the PO main page. If your PO does not show up on the <b>Purchase Order Amount Approval</b> screen, follow these steps:</p> <ul style="list-style-type: none"> <li>• ‘Find an Existing Value’ –</li> <li>• Make sure your business unit and SetID fills in correctly.</li> <li>• Enter your PO number you recorded in step 18.</li> </ul>	<p><i>You can only approve one PO at a time.</i></p>
25.	<p>Verify that the word “Approve” shows up in the <b>Approval Action</b> box.</p> <p>Click .</p> <p>The <b>Approval Status</b> should change from “Initial” to “Complete.”</p>	<p><b>Note:</b> For training purposes, your security should be set up to approve all your own purchase orders and requisitions in one step. In the live PeopleSoft system, some buyers may have to do the initial approval only and put the PO into workflow or a final approver. That is covered in the Final Approvers Checklist.</p>
26.	<p>If you want to see how the purchase order will look when it is printed, click on the yellow button .</p>	
27.	<p>You will be taken to the Process Monitor.</p> <p>Look for the Process Name “POPO005”.</p> <p>Click the  button every 30-60 seconds until the ‘<b>Run Status</b>’ says “Success” and the ‘<b>Distribution Status</b>’ says “Posted.”</p>	
28.	<p>Click on the <a href="#">Details</a> hyperlink.</p> <p>Then click <a href="#">View Log/Trace</a>.</p> <p>In the middle of the next screen under File List, Name look for a PDF file beginning with “POPO0005.” Click on that link.</p> <p>This is how your purchase order will look when it is “dispatched,” or printed. Note how everything you entered is now appearing:</p> <ul style="list-style-type: none"> <li>• Buyer’s name</li> <li>• Ship To address</li> <li>• Bill To address (may be different in some agencies)</li> <li>• Your item description, quantity, price, and amount.</li> <li>• Your Header Comment prints first, then your shipping comment.</li> </ul> <p>If you scroll to the bottom of the pdf screen, you will notice that it says “<b>Unauthorized</b>.” The approver’s name will appear her after the dispatching process, but not until then.</p> <p>If something is incorrect, you can still go back and fix the PO at this point.</p> <p>Depending upon what you change on the PO, you may have to budget check it again before dispatching.</p>	<p><i>This preview of the PO is a new feature with PeopleSoft 9.0. It is meant to be a preview only and so the signature will always show as “Unapproved.” This is a safety measure so that this view cannot be sent to the vendor without further approval and/or dispatching.</i></p>



29.	<u>Printing the Purchase Order</u> Please complete training exercise 2 on Dispatching to print your purchase order.	
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**Exercise 3: Create a PO with One Line, One Schedule, and Multiple Distributions.**

Steps	Directions	Comments
1.	<b>Navigation:</b> <i>Purchasing</i> → <i>Purchase Orders</i> → <i>Add/Update POs</i>	
2.	On the “Add a New Value” Page Verify <b>Business Unit (BU)</b> Keep <b>Purchase Order</b> as <b>(NEXT)</b> Click  .	Click  to search BU (if needed).  The Purchase Order number should default in as NEXT. <u>DO NOT</u> change or overwrite this information.
3.	<b>Maintain Purchase Order Page</b> Enter the vendor number in the Vendor ID field, or Click on <a href="#">Vendor Search</a> and search for a vendor by Name 1 or Short Name. Click ‘Search’. Check the box that corresponds to the vendor you want. Click ‘OK’.	
4.	Click on <a href="#">Vendor Details</a> to verify the correct address. Use the look-up feature on the Location to find the correct address for your PO. Click OK.	It is necessary to check the address of the vendor because it may default to “Choose the Correct Address/Location” on your PO.
5.	Enter yourself as a buyer by using the look-up feature  to find the value.	Some of the defaults may fill in based upon the Buyer Setup.
6.	Enter a PO Reference to describe the purchase or the project it is being purchased for.	The PO reference field can be used to track purchases for a particular product, service, or program.
7.	As long as you do not have to change the origin code or accounting date, ignore the <a href="#">Header Details</a> page for now.	
8.	Click the <a href="#">PO Defaults</a> hyperlink. <ul style="list-style-type: none"> <li>Fill in any fields on this page that will pertain to each line of your purchase order, such as: <ul style="list-style-type: none"> <li>Category or unit of measure</li> <li>The Ship To location</li> <li>A SpeedChart</li> <li>Or any other accounting information each line has in common.</li> </ul> </li> <li>Enter today’s date as the Due Date.</li> <li>Click ‘OK.’</li> </ul>	Fields most often filled in as defaults are: <ol style="list-style-type: none"> <li>1. Ship To location</li> <li>2. Oper Unit</li> <li>3. Fund</li> <li>4. Dept</li> <li>5. Class</li> <li>6. Location (found at the far right of the screen)</li> </ol>
9.	We will skip entering any comments for this exercise since they are optional.	
10.	Move to the section called <b>Lines</b> . <ul style="list-style-type: none"> <li>Enter a <b>Description</b></li> <li>Enter <b>PO Qty</b> of <b>2</b></li> <li>Enter <b>UOM</b> of <b>EA</b> for each.</li> <li>Enter a <b>Category</b> number of <b>60044</b></li> <li>Enter a <b>Price</b> of <b>\$500.00</b>.</li> <li>Click . The total amount should be <b>\$1,000.00</b></li> </ul>	If your description is larger than 250 characters, click the Line Comments icon  . This is also limited to 250 characters, but you can add as many line comments you need by clicking on the + sign by the yellow Inactivate button.

Steps	Directions	Comments												
11.	<p>If the category you selected is an inventory item, you will see that the <b>Receiving Required</b> field changed its value to "Receiving is Required."</p> <p>You must change this field back to say "<b>Receiving is Optional.</b>"</p> <p>Click the Schedule icon  on the far right of the Line.</p>	<i>New step for 9.0 version.</i>												
12.	<p><b>Schedule Page</b></p> <p>Verify that the Due Date, Ship To, PO Qty, Price, and Amount fields are filled in.</p> <p>You can make any changes to these fields as necessary. Click  again if you do.</p>													
13.	<p>If the category you selected is an inventory item, you will see that the <b>Receiving Required</b> field changed its value to "Receiving is Required."</p> <p>You must change this field back to say "<b>Receiving is Optional.</b>"</p> <p>Click the Schedule icon  on the far right of the Line.</p>	<i>New step for 9.0 version.</i>												
14.	<p><b>Distribution for Schedule 1</b></p> <p>Change the <b>PO Quantity</b> from 2 to 1</p> <p>Add a second distribution line by clicking the + sign on the far right side of the page, next to the Sales Tax/Use icon.</p> <p>A Script Prompt box will appear asking how many rows you wish to add. Enter "1" and click OK.</p>	<i>For any of these exercises, you may select a SpeedChart on the distribution page if your agency uses them.</i>												
15.	<p>Note the <b>Distribute by</b> drop down box above the SpeedChart box.</p> <p>If the word "<b>Quantity</b>" is filled in, the values under the Percent and PO Qty boxes should show like this:</p> <table><tr><th>Percent</th><th>PO Qty</th></tr><tr><td>50.00</td><td>1.0000</td></tr><tr><td>50.00</td><td>1.0000</td></tr></table> <p>If you change the Distribute by field to "Amount", your screen should look like this:</p> <table><tr><th>Percent</th><th>Amount</th></tr><tr><td>50.00</td><td>500.00</td></tr><tr><td>50.00</td><td>500.00</td></tr></table>	Percent	PO Qty	50.00	1.0000	50.00	1.0000	Percent	Amount	50.00	500.00	50.00	500.00	<p><i>Either distribution method works fine. It is the buyer's decision as to which way to split the distribution if better for their agency or that PO.</i></p> <p><b>NOTE:</b> If you change the "Distribute by" field before adding a second row, you will have to manually enter the percent and amount for each additional line.</p>
Percent	PO Qty													
50.00	1.0000													
50.00	1.0000													
Percent	Amount													
50.00	500.00													
50.00	500.00													
16.	<p>You will have to change the account number on Line 1 to <b>532140</b>.</p> <p>Enter the distribution on Line 2, using your agency's chartfield values. Try entering a different <b>account</b> number and <b>Location</b> from Line 1 by using the magnifying glass.</p> <p>You may also add a project to this line if your agency uses them. Click OK.</p>													
17.	<p>You are on the Schedule Page; click the <a href="#">Return to Main Page</a> hyperlink to get back to the Maintain PO screen.</p> <p>Then click .</p>	Record this PO number here: _____												



Steps	Directions	Comments
18.	Budget check and approve this PO as for the other steps. <b>Please complete training exercise 2 on Dispatching to print your purchase order.</b>	